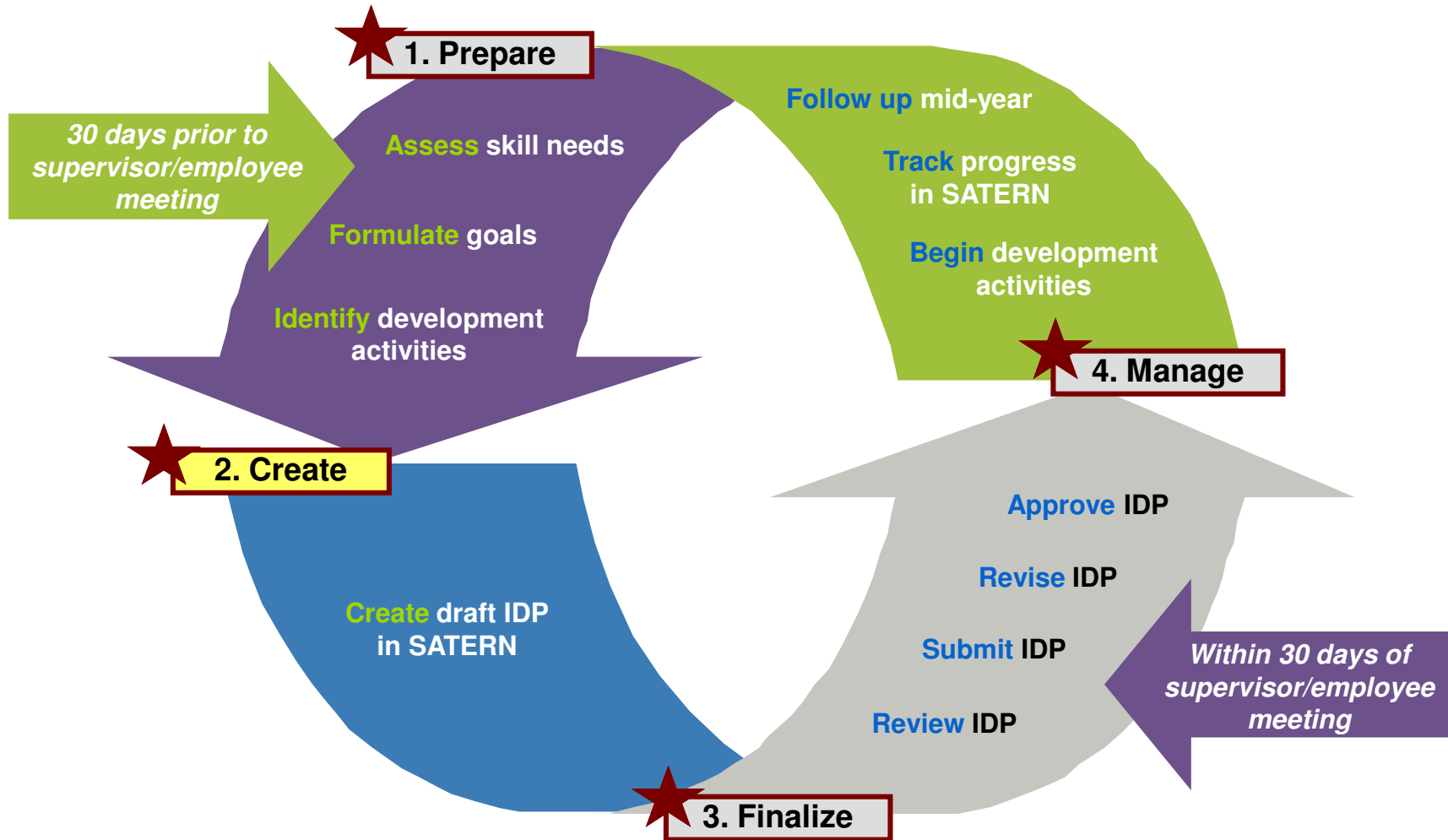




Module 3

Phase 2: Create Your IDP

IDP Create Phase



Time spent in planning prepares the groundwork for a realistic and worthwhile IDP.



IDP Create Phase (cont.)

This module will review all of the steps involved in creating your IDP.

You will learn how to:

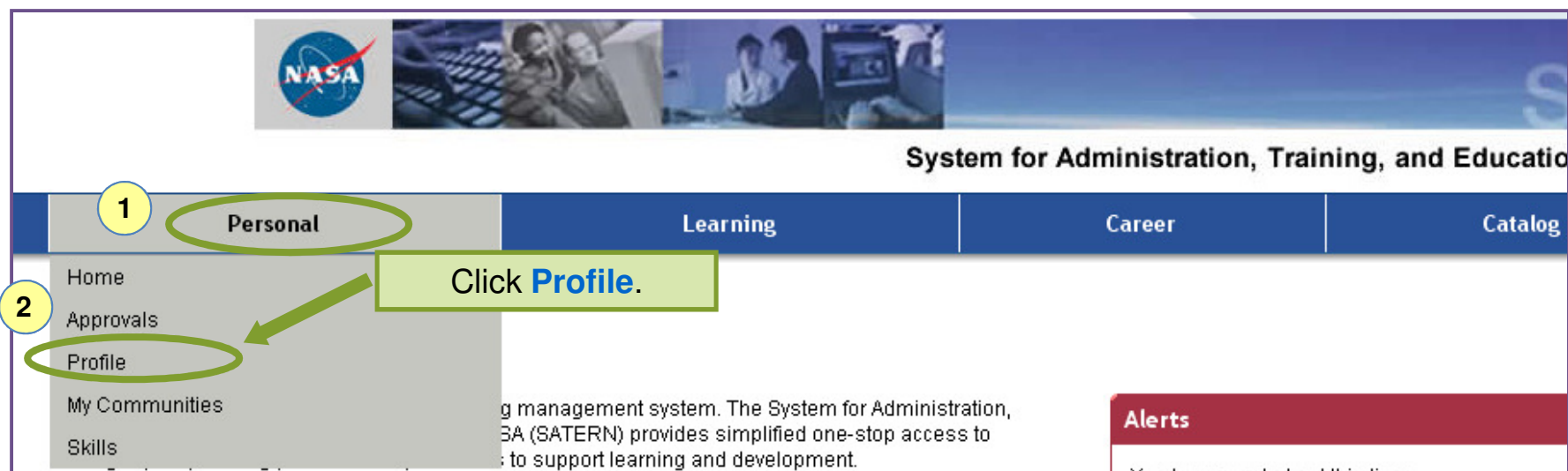
- Navigate to the IDP in SATERN
- Create a new plan
- Enter plan information
- Add goals to your plan
- Add development activities to your plans




To Add a Coach or Mentor

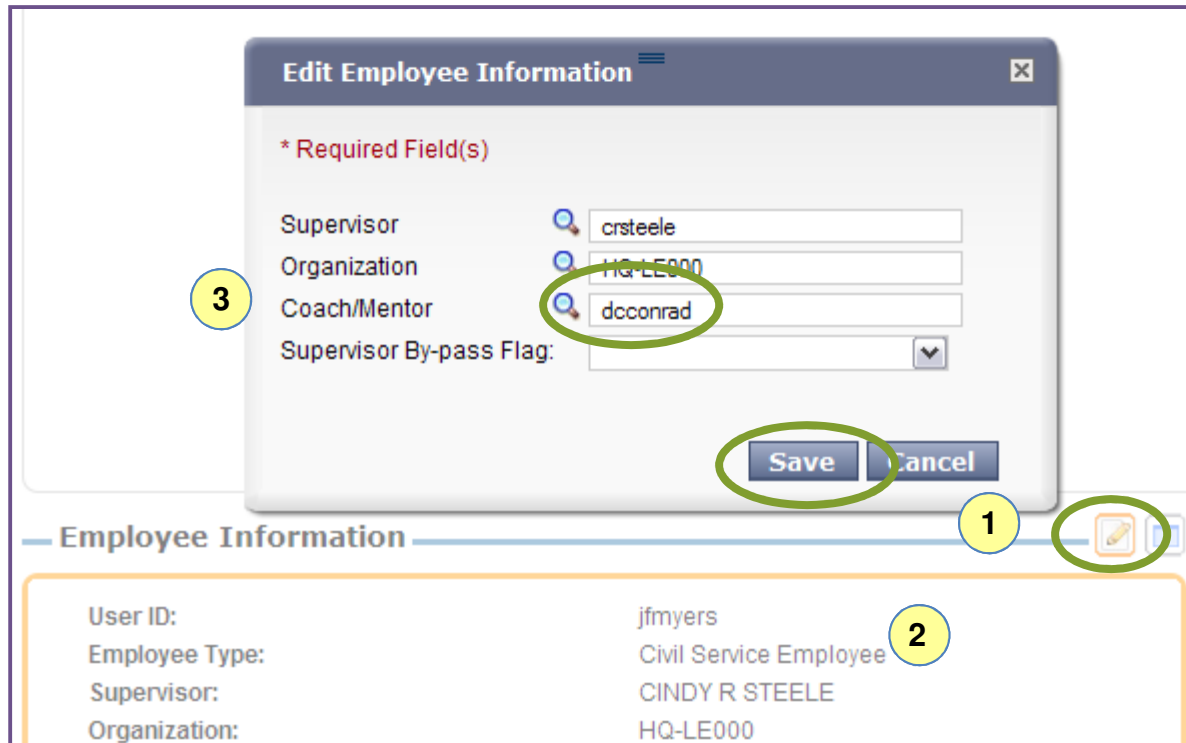
When you log in to SATERN, your **Personal** tab will display.

- If you have a coach or mentor that you want to review your IDP, click on the **Profile** section of the **Personal** tab:



To Add a Coach or Mentor (cont.)

1. Click on the pencil icon () to add or change your Coach/Mentor
2. Click on the yellow **Employee Information** box to edit
3. Browse to find your coach/mentor, select, and click **Save**



Edit Employee Information

* Required Field(s)

Supervisor: crsteele

Organization: HQ-LE000

Coach/Mentor: dconrad

Supervisor By-pass Flag: ☐

Save **Cancel**

Employee Information

User ID: jfmymers

Employee Type: Civil Service Employee

Supervisor: CINDY R STEELE

Organization: HQ-LE000

Prepare

Create

Finalize

Manage

Verify your Supervisor

- Check your supervisor to ensure it is the correct one.
 - If not, correct and set the **Supervisor By-pass Flag** to **Y (Yes)**

Edit Employee Information

* Required Field(s)

Supervisor: crsteele

Organization: HQ-LE000

Coach/Mentor: dconrad

Supervisor By-pass Flag:
N (No)
Y (Yes)

Save Cancel

Employee Information

User ID: jfmyers
Employee Type: Civil Service Employee
Supervisor: CINDY R STEELE



Navigate to IDP

You will find the **IDP** under the **Career** tab, which is located in the center of the SATERN navigation bar.

The screenshot shows the SATERN web application interface. At the top, there is a header with the NASA logo and the text "System for Administration, Training, and Educational Resources for NASA". Below this is a navigation bar with tabs: Personal, Learning, Career, Catalog, and Reports. The "Career" tab is highlighted with a green circle and a yellow callout "2". A dropdown menu is open under the "Career" tab, showing options: IDP, Assessment History, and View Your Competencies. The "IDP" option is highlighted with a green circle and a yellow callout "1". A green arrow points from a text box "Click Career, then IDP." to the "IDP" option. The main content area on the left displays a welcome message for Jennifer Myers, dated 10/14/2009, and provides information about SATERN and contact details for the NSSC Contact Center. On the right, there is an "Alerts" section stating "You have no alerts at this time." and a "Catalog" section with links to "View all available instructor-led items", "View all available online items", and "Browse Catalog".



The **View Your Competencies** selection allows you to view your competency assignments from NASA's Competency Management System (CMS).



Create a New Plan

Now that you have navigated your way to the IDP, it is time to create your plan.

Welcome Jennifer Myers | Home | Search Catalog



System for Administration, Training, and Educational Resources for NASA

Personal

Learning

Career

Catalog

Reports

IDPs

Below is a list of all your IDPs. To view an IDP, choose the **View IDP** option for that IDP. If you have permission and the IDP is editable, choose the **Edit IDP** option for that IDP. If you have permission and you want to begin the process of creating a new IDP, choose the **Create New IDP** option.

There are no IDPs available

Create New IDP

Click **Create New IDP**.





Enter Plan Information

The IDP system requires that you provide some information about your new plan.

- This information will help you find your plan in the future and make sure your plan is active on the correct date.

A screenshot of a web form titled "Create IDP". Below the title is a subtitle: "You have chosen to create a new IDP. Enter the overall details for this IDP and select Add to create the IDP." The form has a section header "IDP Information" in a blue bar. Below this are several input fields: "IDP Title:" with the text "Systems Engineering" entered; "IDP Period:" with a "Select Clear" button; "IDP Purpose:"; "Effective Date:" with a placeholder "(MMM/d/yyyy)"; and "Expiration Date:" with a placeholder "(MMM/d/yyyy)". Two green arrows point to the "IDP Title:" and "IDP Period:" fields. A green callout box to the right of the form contains the text: "IDP Title and IDP Period are the only two required fields."

Create IDP
You have chosen to create a new IDP. Enter the overall details for this IDP and select **Add** to create the IDP.

IDP Information

★ IDP Title: Systems Engineering

★ IDP Period: Select Clear

IDP Purpose:

Effective Date: (MMM/d/yyyy)

Expiration Date: (MMM/d/yyyy)

IDP Title and IDP Period are the only two required fields.

The **IDP Title** should be intuitive, so that others (e.g., supervisor, coach) can identify this plan.





Enter Plan Information (cont.)

Standard date periods are provided for selection:

Create IDP

You have chosen to create a new IDP. Enter the overall details for this IDP and select **Add** to create the IDP.

IDP Information

* IDP Title: Systems Engineering

* IDP Period:

IDP Purpose:

Effective Date:
(MM/DD/YYYY)

Expiration Date:
(MM/DD/YYYY)

1

Click **Select**.

The **IDP Period** is the time period during which you intend to reach the goals on the plan.

Date Periods > - Mozilla Firefox

https://nasa58.gpehosting.com/plateau/search/initSearch.do?searchType=0&selectorName=DatePeriod&stackID:

Date Periods [Search](#) [Help](#)

> Search Results

Search Results

View Item Results

Records per Page 10 (5 total records)

Date Period ID	Description	Select
CY 2010	Calendar Year 2010	Select
Leadership Programs FY 2010	Leadership Programs - Fiscal Year 2010	Select
PY 2009 - 1 Year	Performance Year 2009 (1 year)	Select
PY 2009 - 2 year	Performance Year 2009 (2 year)	Select
PY 2009 - 3 year	Performance Year 2009 (3 year)	Select

Records per Page 10 (5 total records)

Done nasa58.gpehosting.com

2

Click **Select** on applicable **Date Period**.

Ask your supervisor or Center Training Office if a certain date period is required.



Enter Plan Information (cont.)

Finish creating your Plan:

- Confirm or change the **Effective** and/or **Expirations Date/s**.
- Click **Add** when finished.

Create IDP

You have chosen to create a new IDP. Enter the overall details for this IDP and select **Add** to create the IDP.

IDP Information

★ IDP Title:	<input type="text" value="Systems Engineering"/>	
★ IDP Period:	<input type="text" value="Performance Year 2009 (1 year)"/>	<input type="button" value="Select Clear"/>
IDP Purpose:	<input type="text" value="To support a shift to systems engineering"/>	
Effective Date: (MM/DD/YYYY)	<input type="text" value="5/1/2009"/>	
Expiration Date: (MM/DD/YYYY)	<input type="text" value="4/30/2010"/>	

Effective Date and Expiration Date will automatically fill, based on the selected **IDP Period**.

Click **Add**.

IDPs created before December 2009 will not have date periods, only expiration dates.




Enter Plan Information (cont.)

Let us quickly review:

- If applicable, you added a **Coach/Mentor** to your profile
- You created a new plan that contains the necessary plan information: **IDP Title** and **IDP Period**.

Your **Plan Information** is complete.

My IDPs and Goals 

The details of this IDP are shown below. You may add or edit goals to the IDPs. You may add or edit supporting activities for those goals. You must submit the IDP for approval. Once your IDP is approved by your supervisor, you will be allowed to update the status of goals and activities. You may view or add notes to this IDP at any time. To select another IDP, hover your mouse over the image by the side of the current IDP title and select a different IDP. If you have been designated as a Coach, you may view, update, or add other users' IDPs.

* = Required Fields

IDP Title : Systems Engineering (Select Other IDP)	IDP Period : Performance Year 2009 (1 year) Select Clear
* IDP Title : Systems Engineering	IDP Purpose : To support a shift to systems engine
IDP Status : Draft	Version : 0 (current) ▼
Effective Date : 5/1/2009	* Expiration Date : 4/30/2010

Print IDPList all IDPsView/Add NotesSaveSubmit for Approval





Adding Goals and Activities

- You need to have at least one goal with at least one activity for each goal to submit your IDP for approval
- If you created IDPs previously in SATERN, you will be able to copy goals and activities from your other IDPs:

Create IDP

You have chosen to create a new IDP. Enter the overall details for this IDP and select **Add** to create the IDP.

IDP Information

★ IDP Title:

★ IDP Period:

Select Clear

IDP Purpose:

Effective Date:

(MM/DD/YYYY)

Expiration Date:

(MM/DD/YYYY)

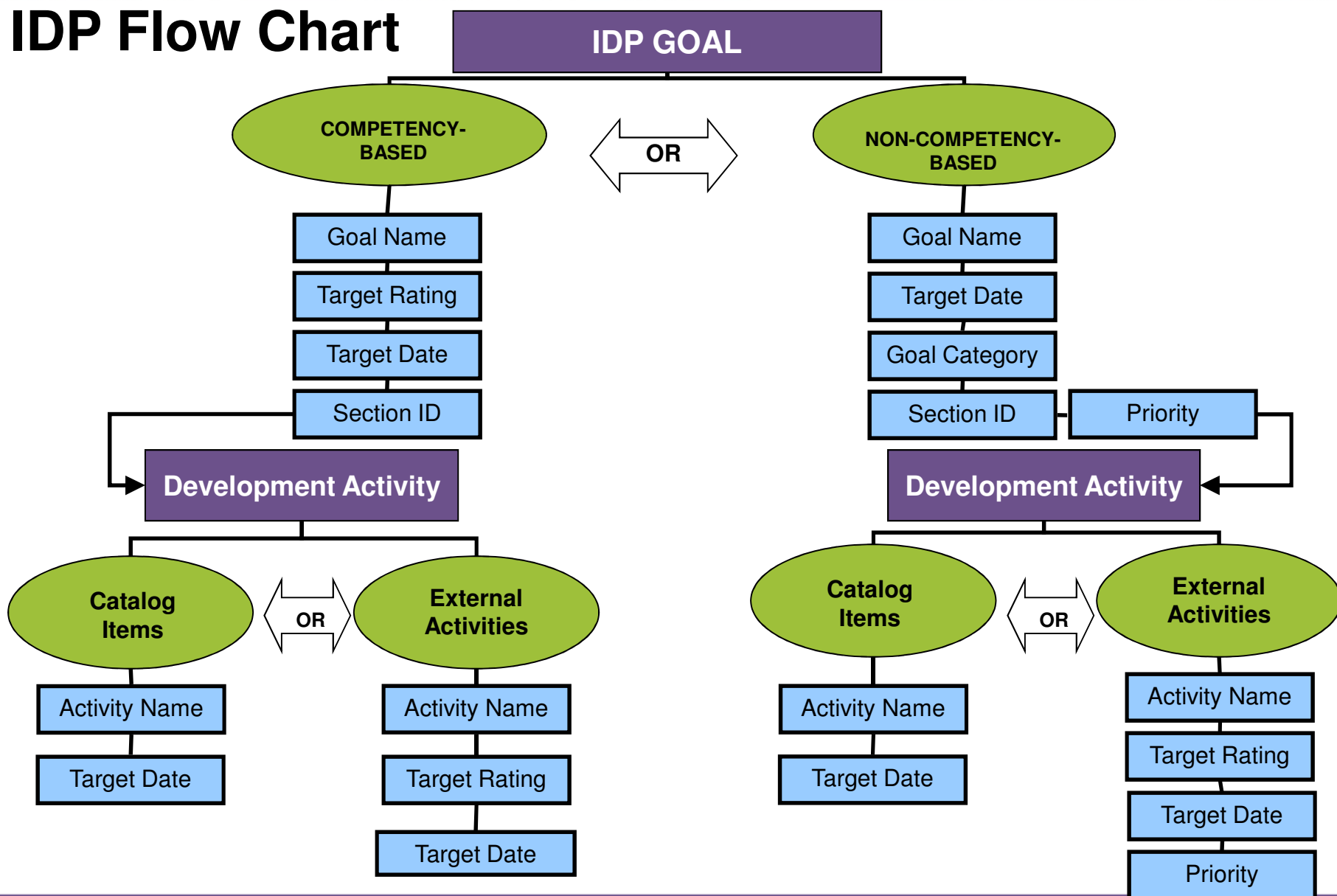
Copy Goals and Activities from Active IDP

Select All / Deselect All

Goal Name	Goal Description	Target Date	Competency Related	IDP Area	Complete	Percent Toward Target	Select
Systems Engineering		9/3/2010	Yes	Development	No	0.00% 0 <div></div> 4 Current:0 Target:1	<input type="checkbox"/>
Human Capital Management		12/31/2012	Yes	Development	No	0.00% 0 <div></div> 4 Current:0 Target:1	<input type="checkbox"/>
Bioengineering		1/29/2010	Yes	Development	No	0.00% 0 <div></div> 4 Current:0 Target:1	<input type="checkbox"/>

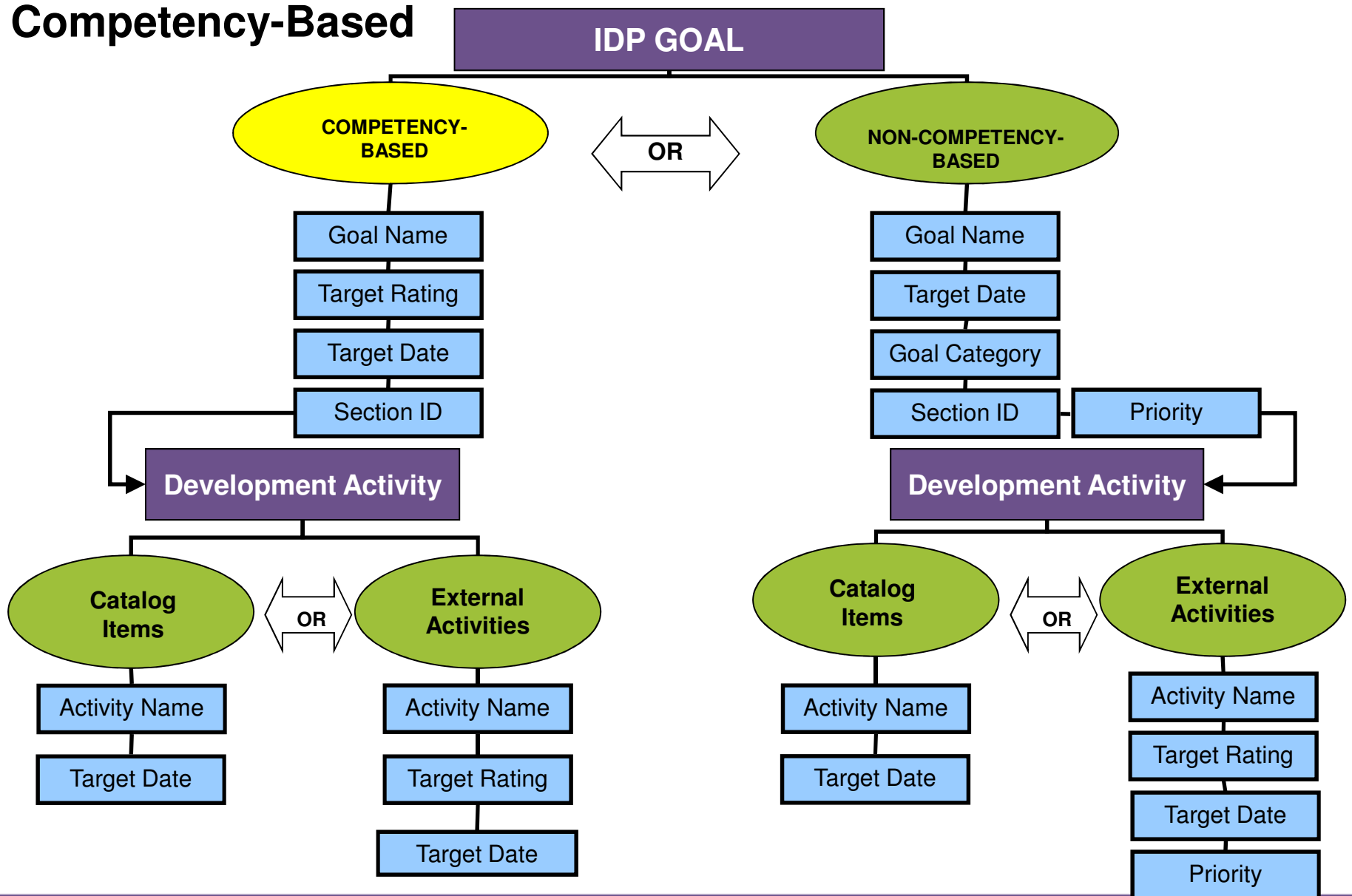


IDP Flow Chart





Competency-Based





Add a Competency-Based Goal

The next step in creating your plan is to add goals.

There are two types of goals: **competency-based** goals and **non-competency-based** goals.

In the next several slides, you will learn how to add a **competency-based goal** to your plan.





Add a Competency-Based Goal (cont.)

The intent of a competency-based goal is to build skills or develop expertise in a NASA competency from the CMS.

My IDPs and Goals

The details of this IDP are shown below. You may add or edit goals to the IDPs. You may add or edit supporting activities for those goals. You must submit the IDP for approval. Once your IDP is approved by your supervisor, you will be allowed to update the status of goals and activities. You may view or add notes to this IDP at any time. To select another IDP, hover your mouse over the image by the side of the current IDP title and select a different IDP. If you have been designated as a Coach, you may view, update, or add other users' IDPs.

* = Required Fields

IDP Title : Systems Engineering (Select Other IDP) IDP Period : Performance Year 2009 (1 year) Select | Clear

* IDP Title : Systems Engineering IDP Purpose : To support a career shift to systems

IDP Status : Draft Version : 0 (current) v

Effective Date: 5/1/2009 * Expiration Date: 4/30/2010

Print IDP List all IDPs View/Add Notes Save Submit for Approval

Development Personal

Title: Add Description

Group By: Section Field Chooser **New Goal**

There are no goals on this IDP area. Please add new goals by clicking the **New Goal** button.

Click **New Goal** in the **Development** tab.





Add a Competency-Based Goal (cont.)

Use the IDP **Goal Wizard** functionality to create competency-based goals:

Add Goal to IDP

[← Back](#)

You have chosen to add a goal to your Plan. Enter the details for the goal below or use the Goal Wizard, then choose Save to add the goal to your plan. To cancel, choose the Back option. You can fill out the Goal Details section below to add an ad-hoc Goal. If you would like instead to add Goals based on your competencies, add goals for a targeted job position, copy goals from other plans or even to adopt another user's Goals then use the Goal Wizard

Systems Engineering

IDP Period: PY 2009 - 1 Year

IDP Purpose: To support a career shift to systems engineering

Expiration Date: 4/30/2010

Effective Date: 5/1/2009

Goal Wizard

Click **Goal Wizard**.



Add a Competency-Based Goal (cont.)

The first thing you will be asked to do is to select your **Goal Type**.

Selecting **Competency** will allow you to search the CMS dictionary and choose a CMS competency on which to base your goal.

The screenshot shows a web form titled "Choose Goal Type". It contains two radio button options: "Add Competency Related Goals" and "Add Goals from Other Plans". A green circle with the number "1" highlights the first option, with a callout box stating "Select **Add Competency Related Goals**." To the right, a "Next" button is highlighted with a green circle and the number "2", with a callout box stating "Click **Next**." A green arrow points from the "Next" button back to the first option.





Add a Competency-Based Goal (cont.)

When you choose a competency-based goal, you will search the CMS by entering **Keywords**.

You can choose to:

- **Search from all Competencies** within the CMS catalog
- **Show Only Competencies Assigned to You**: this includes competencies assigned to your job ID and competencies you have added to your CMS profile
- **Show Competencies Assigned to Job Position**: this includes competencies related to a specific job ID

The screenshot shows the 'Search Competencies' interface. A green box with a yellow circle containing the number '1' points to the 'Keywords' input field, which contains the text 'systems engineering'. A green box with a yellow circle containing the number '2' points to the 'Next' button. A green box with the text 'Click Next.' also points to the 'Next' button. The interface includes a 'Previous' button, a 'Next' button, and a list of search options: 'Search from all Competencies' (selected), 'Show Only Competencies Assigned to You', 'Show Competencies Assigned to Job Position', 'Not Applicable', and 'Not Applicable'. A green box with the text 'Enter the Keywords you wish to search for and select your category.' points to the search options.





Add a Competency-Based Goal (cont.)

When the keyword search returns selections, choose the best fit:

Goal Wizard

Choose Goal Type → Search Competencies → **Select Competencies**

The list below contains the results from your competency search. Select the competency or competencies you wish to add as goal(s) to your IDP to continue, or choose **Previous** to go back and modify your search criteria.

Keywords: *systems engineering*
Exact Phrase: *No*
Your Competencies Only: *No*
Job Position: *(none specified)*
Subject Area: *(none specified)*
Competency Profile: *(none specified)*

[Previous](#) [Next](#)

[Select All](#) [Deselect All](#)

Competency Description	Current Assessed Rating	Required Rating	Goal	Select
Computer Systems and Engineering	0.0	4.0	Current:1.0 Req:1	<input type="checkbox"/>
Systems Engineering	0.0	4.0	Current:1.0 Req:1	<input checked="" type="checkbox"/>
Systems Integration Engineering	0.0	4.0	Current:1.0 Req:1	<input type="checkbox"/>

[Select All](#) [Deselect All](#)

Click **Next**.

Click to **Select**.





Add a Competency-Based Goal (cont.)

In order to finish adding this goal, you need to enter **Goal Details**.

There are four required fields:

- **Goal Name** will default to the competency name, but you can rename it if you wish
- **Target Rating** should always be listed as “1”
- **Target Date** is the date by which you want to achieve the goal
- **IDP Section ID** is the time range to achieve the goal

Confirm or enter the required goal information.

* = Required Fields

Previous Done Save and Add Another Cancel

[Select All](#) / [Deselect All](#)

Goal Details										
Competency	Goal Number	* Goal Name	Last Assessment	* Target Rating (1000)	Stretch Rating (1000)	* Target Date (MM/DD/YYYY)	* IDP Section ID	Priority	Select to Add	Create Activities
Systems Engineering	<input type="text"/>	Systems Engineering	0.00	1 <input type="button" value="v"/>	<input type="button" value="v"/>	<input type="text"/>	-- Please Select One -- <input type="button" value="v"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Select All](#) / [Deselect All](#)

You can set the **Priority** after you **Save** the Goal by clicking **Edit**.





Add a Competency-Based Goal (cont.)

IDP Section ID

You can create short-, mid-, or long-range goals, though you are not required to have all three in your plan.

- Begin with adding a **Short-Range Goal**. This is a goal that you want to achieve within the next year.

Select **IDP Section ID**.

* IDP Section ID

SHORT-RANGE GOALS: 1 YEAR

-- Please Select One --

SHORT-RANGE GOALS: 1 YEAR

MID-RANGE GOALS: 2 - 4 YEARS

LONG-RANGE GOALS: 5 YEARS AND BEYOND



Add a Competency-Based Goal (cont.)

Once you have completed your goal information, click **Done**.

Click **Done**.



* = Required Fields

Previous **Done** Save and Add Another Cancel

[Select All](#) / [Deselect All](#)

Goal Details										
Competency	Goal Number	* Goal Name	Last Assessment	* Target Rating (1000)	Stretch Rating (1000)	* Target Date (MM/DD/YYYY)	* IDP Section ID	Priority	Select to Add	Create Activities
Systems Engineering	<input type="text"/>	Systems Engineering	0.00	1 <input type="button" value="v"/>	<input type="button" value="v"/>	09/30/2009 <input type="button" value="v"/>	SHORT-RANGE GOALS: 1 YEAR <input type="button" value="v"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Select All](#) / [Deselect All](#)



Add a Competency-Based Goal (cont.)

Let us quickly review:

- You searched the CMS dictionary for a competency on which to base your goal
- You entered the **Goal Details** required by the IDP tool, including the **Section**

The screenshot shows a web-based interface for managing goals. At the top, there's a 'Group By:' dropdown menu set to 'Section' and buttons for 'Field Chooser' and 'New Goal'. Below this, a section header reads 'Section Name: SHORT-RANGE GOALS: 1 YEAR(1)'. A table lists goals with columns for 'Goal Name', 'Target Date', 'Priority', 'Percent Toward Target', and 'Remove'. One goal is listed: 'Systems Engineering' with a target date of '9/30/2009'. A progress bar shows '0.00%' completion, with 'Current:0' and 'Target:1'. To the right of the goal are buttons for 'View/Add Notes', 'Move Goal', and 'Edit'. A red 'X' icon is next to the 'Remove' column header.

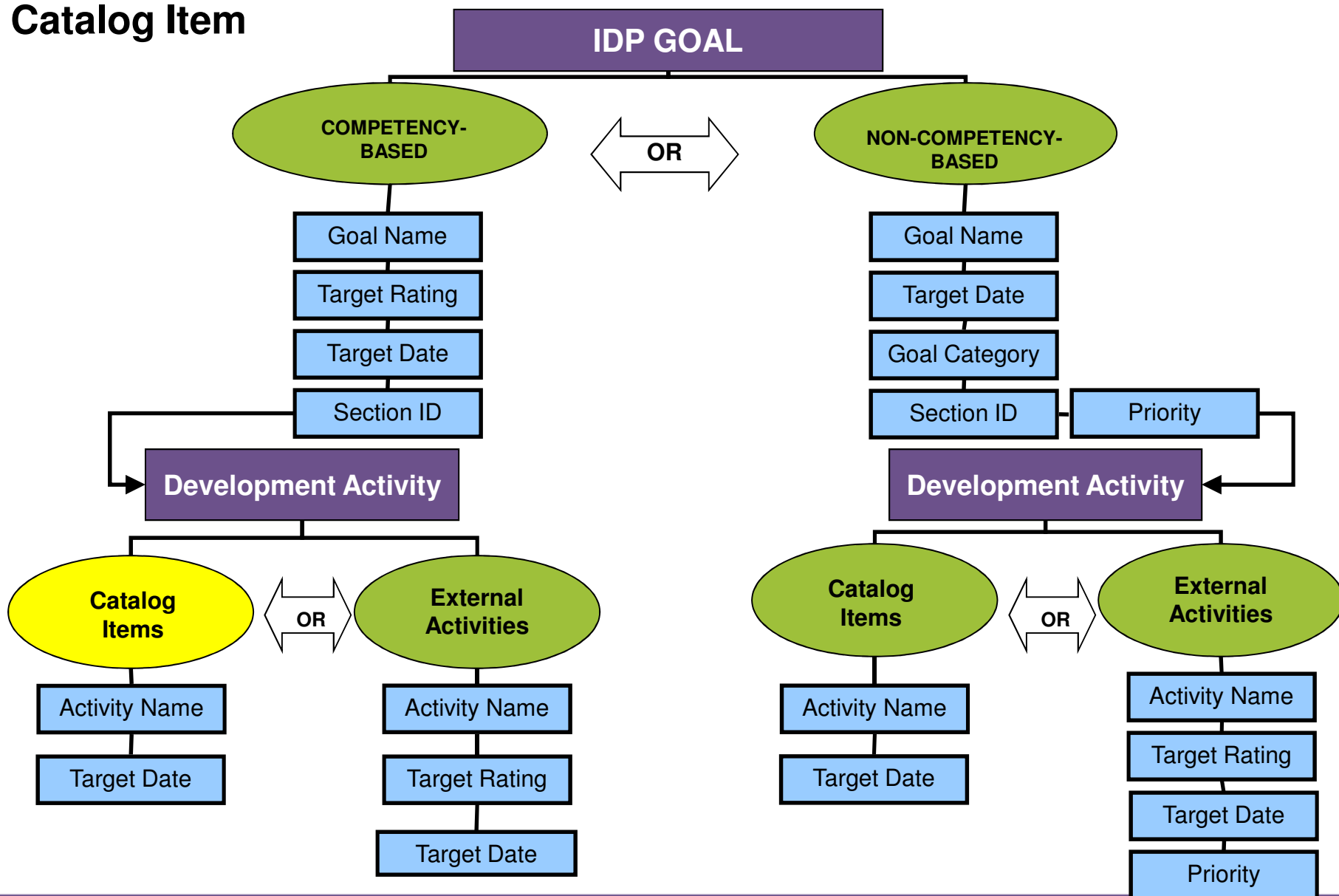
Goal Name	Target Date	Priority	Percent Toward Target	Remove
Systems Engineering	9/30/2009		0.00% 0 <input type="text"/> 0 Current:0 Target:1	View/Add Notes Move Goal Edit

You have now completed the addition of a **competency-based** goal.





Catalog Item





Add a Catalog Item

In order to reach your goals, you will need to engage in some kind of expertise or skill-building activity. In the IDP, these are called **Development Activities**. The IDP tool requires that you add at least one such development activity to each goal.

There are many different types of development activities, including, but not limited to:

- Coursework
- On-the-job training
- Attending professional conferences





Add a Catalog Item (cont.)

In the IDP tool, development activities fall into two categories:

- **Catalog Items:** consist of SATERN catalog items
- **External Activities:** include everything else

In the next several slides, you will learn how to add **catalog items** to your plan.



Add a Catalog Item (cont.)

Go back to the goal you have just created.

Notice the ► symbol next to the **Goal Name**.

- Clicking this button will open up the activities section for this goal.





Add a Catalog Item (cont.)

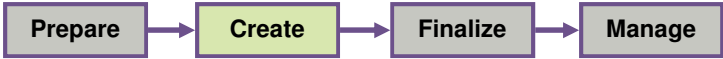
The activity menu will drop down below the goal.

▼ Section Name: SHORT-RANGE GOALS: 1 YEAR(1)

Goal Name ▲	Target Date	Priority	Percent Toward Target		Remove
▼ Systems Engineering	9/30/2009		0.00% 0 <input type="text"/> 0 Current:0 Target:1	<div>View/Add Notes</div> <div>Move Goal</div> <div>Edit</div>	
▶ Details					
▼ Activities (0)					
There are no activities specified for this Goal.					

Add Activity ▼

Click **Add Activity**.

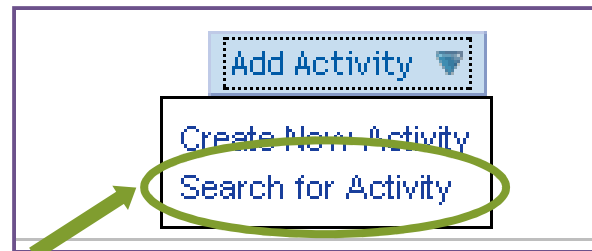




Add a Catalog Item (cont.)

You will be asked to select a development activity type.

- Selecting **Search for Activity** will allow you to search the SATERN catalog for applicable development activities.



Select **Search for Activity**.





Add a Catalog Item (cont.)

At this point, you may search the entire SATERN catalog for items that will help you achieve your goal.

You can search using any of the following criteria:

- **Keywords** – Including SATERN course title and description
- **Competency** – Only technical and business competencies from the CMS dictionary have been assigned to learning items

Learning Item Activity Search

Item Type: ☒ Instructor-Led ☒ Online ☒ Other ☒ Blended (Select one or more)

Keywords: ☐ Exact Phrase

Competency:

Rating:

Do not use Rating as a search criterion.

Search





Add a Catalog Item (cont.)

This example shows a search for SATERN catalog items by competency.

If you are adding a catalog item to a competency-based goal, the competency-based goal will automatically appear in the **Competency** field.

A screenshot of the 'Learning Item Activity Search' form. The form has a blue header bar with the title. Below the header, there are four checkboxes for 'Item Type': 'Instructor-Led', 'Online', 'Other', and 'Blended (Select one or more)', all of which are checked. Below this is a 'Keywords' text input field and an 'Exact Phrase' checkbox. The 'Competency' section includes a dropdown menu set to 'Exact Match' and a text input field containing 'Systems Engineering'. Below that is a 'Rating' section with a dropdown menu set to 'Minimum' and an empty text input field. A green oval highlights the 'Competency' dropdown and text field. A green arrow points from a text box below the form to a 'Search' button, which is also circled in green. The text box contains the instruction: 'After you have entered your search criteria, click Search.'

For a broader search, you may need to remove the competency that populates automatically.





Add a Catalog Item (cont.)

Be aware that competencies have not been assigned to all learning items.

If you perform a search based on a competency, it is possible that the results may not show all relevant courses, and you may wish to broaden your search.

2 After you have selected your items, click **Add**.

1 Select the desired item/s.

Item Search Results

Title	Competency Description (Detail)	Select
ADVANCED METHODS OF SYSTEMS ENGINEERING		<input checked="" type="checkbox"/>
ADVANCED SATELLITE TOOL KIT	Systems Engineering (1)	<input type="checkbox"/>
CREW LAUNCH VEHICLE (CLV) SYSTEMS ENGINEERING AND DESIGN	Systems Engineering (1)	<input type="checkbox"/>
INTRODUCTION TO SATELLITE TOOL KIT	Systems Engineering (1)	<input type="checkbox"/>
LC SATELLITE COMMUNICATION SYSTEMS ENGINEERING	Systems Engineering (1)	<input type="checkbox"/>
MYPRIMAVERA	Systems Engineering (1)	<input type="checkbox"/>
PRIMAVERA PM 102- BASIC PROJECT MANAGEMENT	Systems Engineering (1)	<input type="checkbox"/>
REQUIREMENTS MANAGEMENT IN CRADLE	Systems Engineering (1)	<input type="checkbox"/>
SPACE LAUNCH AND TRANSPORTATION SYSTEMS	Systems Engineering (1)	<input type="checkbox"/>
SPACE MISSION EXCELLENCE PROGRAM ORIENTATION	Systems Engineering (1)	<input type="checkbox"/>

Records per Page: 10 Page: 1 2 «Previous | **Next»** (13 total records)

[Select All](#) / [Deselect All](#)

Add **Cancel**

Prepare → **Create** → **Finalize** → **Manage**



Add a Catalog Item (cont.)

At this point, you are able to enter **Development Activity Details**:

Name ▲	Due Date	Type	Priority	Target / Stretch	Remove
ADVANCED METHODS OF SYSTEMS ENGINEERING	9/30/2010	Catalog Item			<div><div>View/Add Notes</div><div>Edit</div><div>View Item Details</div></div>

To change the activity details, click **Edit**.

There are two required fields:

- **Activity Name** will default to the item name, but you can expand it to be more descriptive if you choose
- **Target Date** will default to the plan expiration date, but you can change it to any date by which you want to complete the activity

Name ▲	Due Date	Type	Priority	Target / Stretch	Remove
ADVANCED METHODS OF SYSTEMS ENGINEERING	9/30/2010	Catalog Item			<div><div>View/Add Notes</div><div>View Item Details</div></div>

Confirm or enter the required activity information.

* **Activity Name:**

* **Related Item:**

* **Target Date:**

Priority:





Add a Catalog Item (cont.)

You are also able to add a **Priority** for these activities:

1- High: Focuses on development directly related to your current job assignment, technical and/or job-specific skill sets, and support organizational goals

2- Medium: Necessary to accomplish organizational mission objectives, or needed to carry out your job responsibilities

3- Low: May or may/not be directly related to your current job description, but will appreciably improve your skill set

A screenshot of a software interface for selecting a priority level. It shows a 'Priority:' label, a dropdown menu with three options: '1 - HIGH (Directly related to current assignments)', '2 - MEDIUM (For mission objectives/job requirements)', and '3 - LOW (Improve skill set/may not be current job)'. Below the dropdown are 'Apply Changes' and 'Cancel' buttons. A green arrow points from a text box to the dropdown, and another green arrow points from a text box to the 'Apply Changes' button.

Enter the **Priority** level for these items.

Once you have entered your activity details, click **Apply Changes**.





Add a Catalog Item (cont.)

Let us quickly review:

- You searched through the SATERN catalog for items related to your competency
- You entered the development activity details required by the IDP tool
- You assigned a priority level to your development activity

You have now completed the addition of a **catalog item development activity**.

Goal Name ▲	Target Date	Priority	Percent Toward Target		Remove	
▼ Systems Engineering	9/30/2010		0.00%	<input type="text" value="0"/> <input type="text" value="0"/> Current:0 Target:1	View/Add Notes Move Goal Edit	

►Details

▼Activities (2)

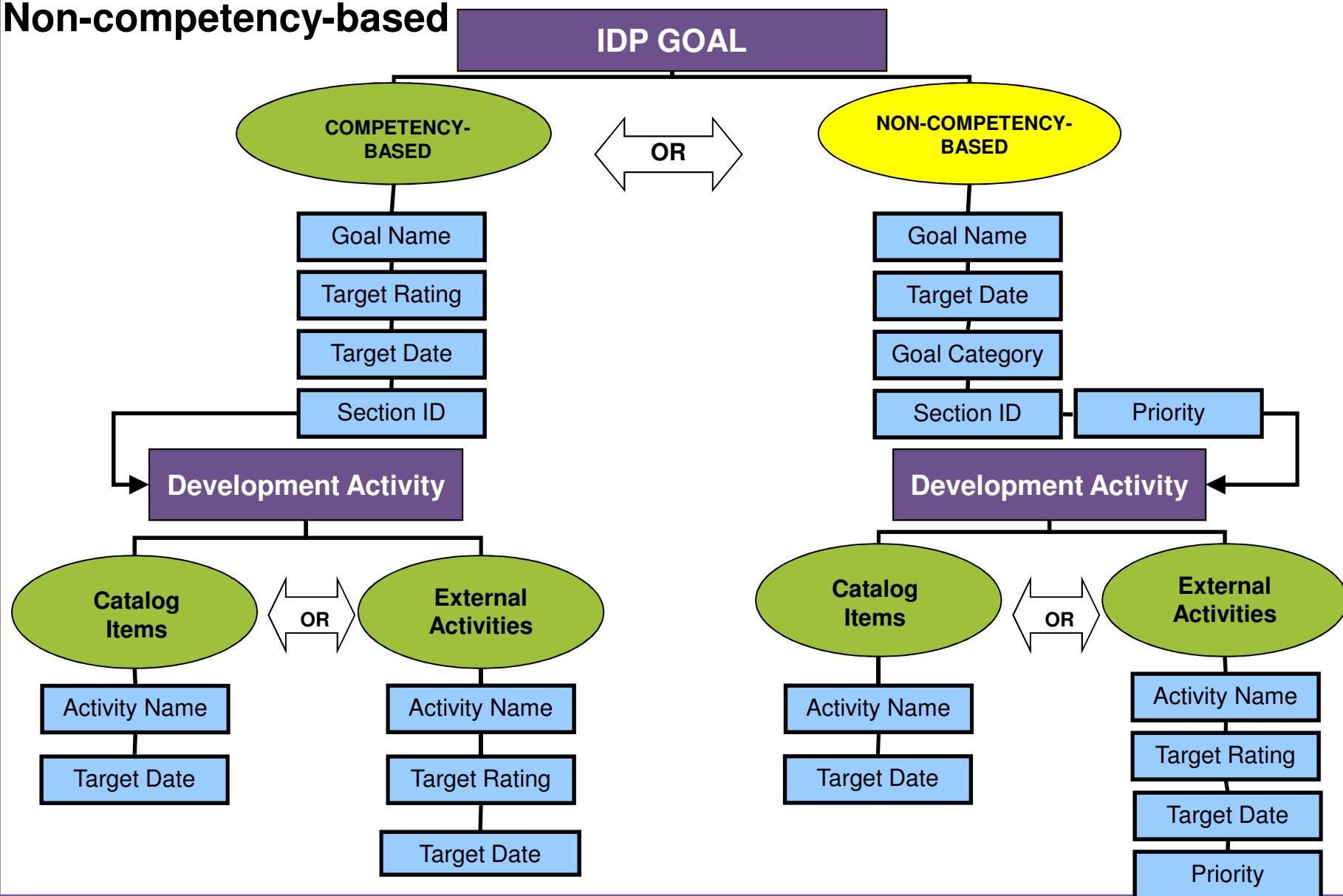
Name ▲	Due Date	Type	Priority	Target / Stretch		Remove
ADVANCED METHODS OF SYSTEMS ENGINEERING	9/30/2010	Catalog Item	Improve skill set/may not be current job		View/Add Notes Edit View Item Details	

[Add Activity ▼](#)

Prepare → **Create** → **Finalize** → **Manage**



Non-competency-based





Add a Non-Competency-Based Goal

Now you have created a competency-based goal and added catalog items from SATERN to support your achievement of that goal.

You also have the option to add goals that are not based on competencies.

In the next several slides, you will learn how to add a **non-competency-based goal** to your plan.





Add a Non-Competency-Based Goal (cont.)

In the **Development** tab, click **New Goal**:

A screenshot of the SATERN web application interface. At the top, there are two tabs: 'Development' and 'Personal'. The 'Development' tab is selected and highlighted with a green circle. Below the tabs, there is a 'Title:' text input field and an 'Add Description' button. Below that, there is a 'Group By:' dropdown menu with 'Section' selected. On the right side of the interface, there is a 'Field Chooser' button and a 'New Goal' button, which is also highlighted with a green circle. A green arrow points from a text box below to the 'New Goal' button.

Click **New Goal**.





Add a Non-Competency-Based Goal (cont.)

Now you are ready to complete the details of your goal.

Add Goal to IDP

[← Back](#)

You have chosen to add a goal to your Plan. Enter the details for the goal below or use the Goal Wizard, then choose Save to add the goal to your plan. To cancel, choose the Back option. You can fill out the Goal Details section below to add an ad-hoc Goal. If you would like instead to add Goals based on your competencies, add goals for a targeted job position, copy goals from other plans or even to adopt another user's Goals then use the Goal Wizard

Systems Engineering

IDP Period: PY 2009 - 1 Year

IDP Purpose: To support a career shift to systems engineering

Expiration Date: 4/30/2010

Effective Date: 5/1/2009

[Goal Wizard](#)

* = Required Fields

Goal Details

Goal Type: Other

[Done](#) [Save and Add Another](#) [Cancel](#)

Goal Number:

* Goal Name:

Goal Description:

Priority:

* Target Date:

Target Value:
(1000)

Stretch Value:
(1000)

Goal Category:

* Section:

Prepare

Create

Finalize

Manage




Add a Non-Competency-Based Goal (cont.)

First, add the **Goal Name** and the **Goal Description**:

- **Goal Name** is the name you choose to give this goal

* = Required Fields

Goal Details	
Goal Type:	Other
Goal Number:	<input type="text"/>
* Goal Name:	<input type="text" value="Develop people management skills"/>



Goal Name is a required field.





Add a Non-Competency-Based Goal (cont.)

You are also able to select a **Goal Category** to provide an optional means of grouping goals:

Select **Goal Category** (Optional).

Goal Category:
* Section:

- ACADEMIC (Related to academic activity)
- LEADERSHIP_DEVELOPMENT (Build capacity to lead, direct or manage)**
- OTHER (No other category applies)
- PERSONAL_GROWTH_&_DEVELOPMENT (For individual or personal development)
- PROFESSIONAL_DEVELOPMENT (For career advancement or enhance skills)

- **Academic Goals** – Goals that identify or relate to an academic activity.
- **Leadership Development Goals** – Goals that identify or relate to a capacity to lead, direct, or manage.
- **Other Goals** – Goals that do not readily identify or relate to Academic Goals, Leadership Development Goals, Personal Growth and Development Goals, or Professional Development Goals.
- **Personal Growth and Development Goals** - Goals that identify or relate to individual or self improvement.
- **Professional Development Goals** - Goals that identify or relate to career advancement or progress aimed to enhance knowledge, skills, or abilities.





Add a Non-Competency-Based Goal (cont.)

You can create **Short-**, **Mid-**, or **Long-Range** goals, though you are not required to have all three in your plan:

A screenshot of a web application interface. On the left, a label 'Section:' is followed by a dropdown menu. The dropdown menu is open, showing four options: '-- Please Select One --', 'SHORT-RANGE GOALS: 1 YEAR', 'MID-RANGE GOALS: 2 - 4 YEARS' (which is highlighted with a grey background), and 'LONG-RANGE GOALS: 5 YEARS AND BEYOND'. A green arrow points from a green box on the right to the 'MID-RANGE GOALS' option. The green box contains the text 'Add a Section.'.

* Section: -- Please Select One --

-- Please Select One --

SHORT-RANGE GOALS: 1 YEAR

MID-RANGE GOALS: 2 - 4 YEARS

LONG-RANGE GOALS: 5 YEARS AND BEYOND

Add a [Section](#).

- **Short-Range** - Goal you plan to achieve *within the next year*
 - Often focus on development related to your current job assignment or technical/job specific skills needed now
- **Mid-Range** – Goal you intend to achieve in *2-4 years*
 - Often development objectives important for growth within your present position or for developing a new skill or area of knowledge
- **Long-Range** – Goal you wish to achieve in *5 years and beyond*
 - Often development goals that reflect career aspirations, taking on greater responsibility, or moving to a new area of work





Add a Non-Competency-Based Goal (cont.)

You are also able to add the **Priority** for this goal:

A screenshot of a web-based form for adding a goal. The form includes fields for 'Priority', '* Target Date', 'Target Value' (with a '(1000)' multiplier), and 'Stretch Value' (with a '(1000)' multiplier). The 'Priority' dropdown menu is open, showing three options: '1 - HIGH (Directly related to current assignments)', '2 - MEDIUM (For mission objectives/job requirements)', and '3 - LOW (Improve skill set/may not be current job)'. A green arrow points from a callout box to the 'Priority' dropdown.

Select a **Priority** (Optional).

- 1 - High** – Development necessary and directly linked to job assignments, job-specific skill sets, and will likely lead to improved job performance and ability to accomplish mission objectives.
- 2 - Medium** – Necessary to accomplish organization strategic goals and objectives, not directly needed to perform job responsibilities, but would improve and enhance job performance.
- 3 - Low** – The development activity supports goals not directly related to your current job description, but will appreciably improve your skill set.





Add a Non-Competency-Based Goal (cont.)

Finally, select your **Target Date**:

- **Target Date** is the date by which you want to achieve the goal.

* Target Date: 09/30/2013

Set a **Target Date**, considering the **Section** selected.

Calendar - Mozilla ...

gpehosting.com https://nasa58...

Select Date Close

September 2013

September 2013

« < Print Today > »

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Downloads Done





Add a Non-Competency-Based Goal (cont.)

Let us summarize the required fields of our goal to Develop people management skills:

- **Goal Name**
- **Section**
- **Target Date**

* = Required Fields

Goal Details

Goal Type: Other

Goal Number:

* Goal Name:

Goal Description:

Goal Category: LEADERSHIP_DEVELOPMENT (Build capacity to lead, direct or manage) ▼

* Section: MID-RANGE GOALS: 2 - 4 YEARS ▼


Prior: LOW (Improve skill set/may not be current job) ▼

* Target Date:

Target Value:
(1000)

Stretch Value:
(1000)

Buttons: Done, Save and Add Another, Cancel



When complete, click **Done**.

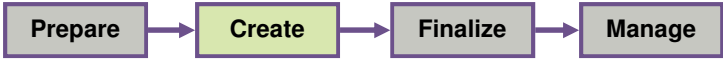




Add a Non-Competency-Based Goal (cont.)

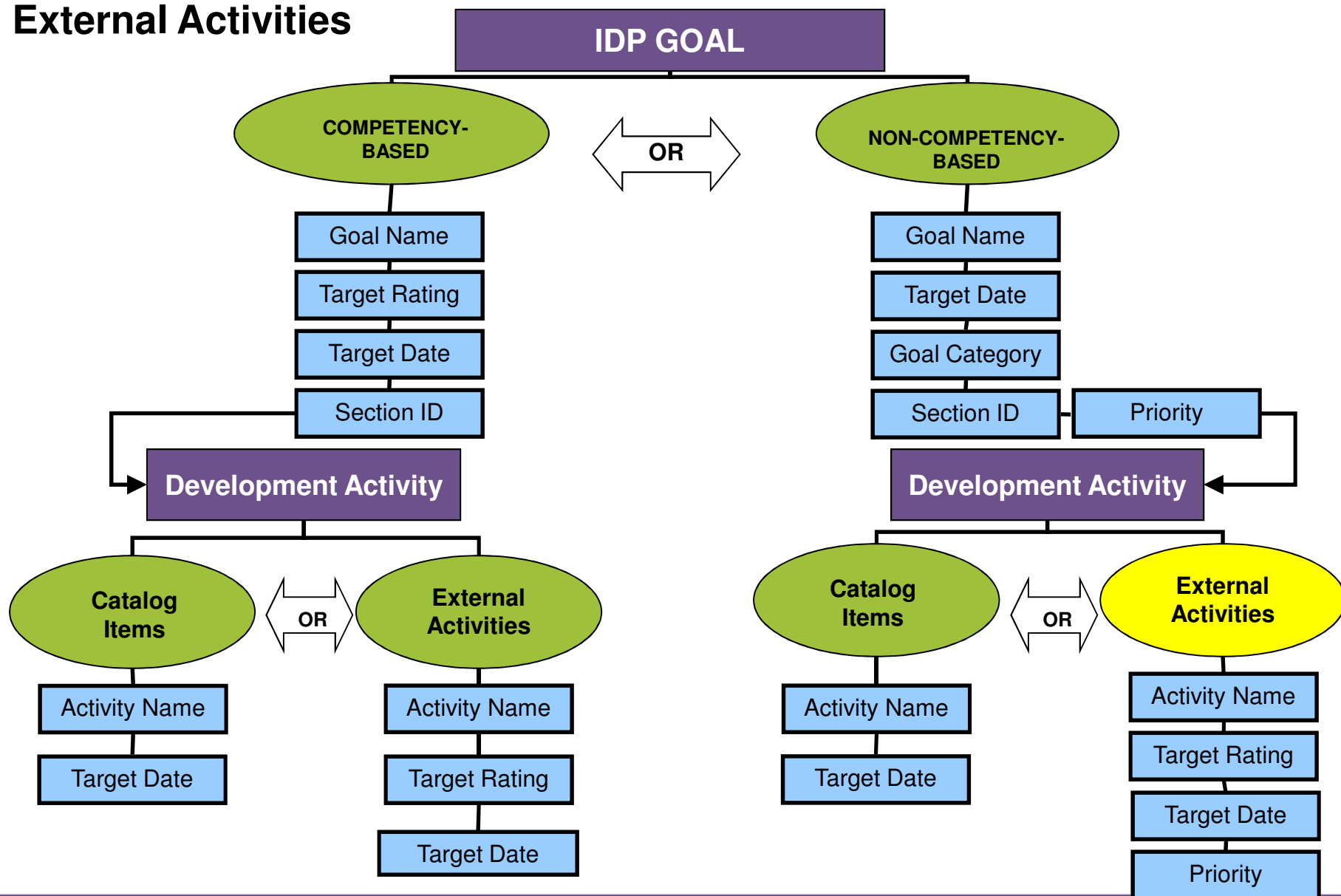
You have now completed the addition of a **non-competency-based goal**:

Group By: Section ▼					Field Chooser	New Goal
▼ Section Name: MID-RANGE GOALS: 2 - 4 YEARS(1)						
Goal Name ▲	Target Date	Priority	Percent Toward Target	Remove		
▶ Develop people management skills	9/30/2013	Improve skill set/may not be current job		View/Add Notes		
				Move Goal		
				Edit		





External Activities





Add an External Activity

SATERN catalog items are an effective way to build skills, but there are many other options available, including, but not limited to, academic courses, professional conferences, and seminars.

In order to add non-SATERN-based development activities to your plan, you will add **External Activities**. In the next several slides you will learn how to add such external activities to your plan.





Add an External Activity (cont.)

Go back to the goal you have just created. Notice the ► symbol next to the **Goal Name**.

- Clicking this button will open up the activities section for this goal.

<u>Goal Name</u> ▲	<u>Target Date</u>
► Develop people management skills	9/30/2013

Click the ► symbol.





Add an External Activity (cont.)

The activity menu will drop down below the goal, allowing you to add an activity.

Goal Name ▲	Target Date	Priority	Percent Toward Target	Remove
▼ Develop people management skills	9/30/2013	Improve skill set/may not be current job		
				View/Add Notes
				Move Goal
				Edit
▶ Details				
▼ Activities (0)				
There are no activities specified for this Goal.				
				Add Activity ▼

Click **Add Activity**.





Add an External Activity (cont.)

You are now able to **Create New Activity** or **Search for Activity**:

- **Create a New Activity** will allow you to create a development activity that is not in the SATERN catalog.





Add an External Activity (cont.)

In order to finish adding this activity, you need to enter the development activity details.

For an external activity, there are two required fields:

- **Activity Name** should describe the activity in enough detail for a reviewer to understand
- **Target Date** is the date by which you want to achieve the activity

A screenshot of a web form titled 'Add Activity - Develop people management skills'. The form includes several fields: 'Activity Type' (a dropdown menu showing 'External Activities (Activities Not in the Catalog su Courses, Conferences, and Seminars)'), 'Activity Name' (a text box containing 'Leadership Development Assignment'), 'Target Date' (a date picker showing '9/30/2013'), 'Priority' (a text box), 'Target Value' (a text box with '(1000)' below it), and 'Stretch Value' (a text box with '(1000)' below it). Red asterisks indicate required fields. Green arrows point from the 'Activity Name' and 'Target Date' fields to callout boxes on the right.

Enter the required activity information, along with any other information you would like.

Target Date will default to the plan expiration date, but you can change it to any date by which you want to achieve the goal. This date does not need to match the expiration date you entered for the plan.





Add an External Activity (cont.)

You are also able to add a **Priority** for this activity:

A screenshot of a web form with a purple border. It contains three labels: 'Priority:', 'Target Value: (1000)', and 'Stretch Value: (4000)'. To the right of these labels is a dropdown menu. The dropdown is open, showing three options: '1 - HIGH (Directly related to current assignments)', '2 - MEDIUM (For mission objectives/job requirements)', and '3 - LOW (Improve skill set/may not be current job)'. A green arrow points from the text box below to the dropdown menu.

Enter a **Priority** level for this activity
(optional).

- 1 - High** – Development necessary and directly linked to job assignments, job-specific skill sets, and will likely lead to improved job performance and ability to accomplish mission objectives.
- 2 - Medium** – Necessary to accomplish organization strategic goals and objectives, not directly needed to perform job responsibilities, but would improve and enhance job performance.
- 3 - Low** – The development activity supports goals not directly related to your current job description, but will appreciably improve your skill set.





Add an External Activity (cont.)

The **Target Value** is the number for a value-based activity

- Example: for 480 hours of an external activity, the target value = 480
- Leave this field blank if the activity is not measured numerically

A screenshot of a web-based form titled "Add Activity - Develop people management skills". The form includes several fields: "Activity Type" (External Activities), "Activity Name" (Leadership Development Assignment), "Target Date" (9/30/2013), "Priority" (3 - LOW), "Target Value" (480), and "Stretch Value" (520). A legend indicates that an asterisk (*) denotes a required field. At the bottom of the form are "Add" and "Cancel" buttons. Green arrows point from callout boxes to the "Add" button, the "Target Value" field, and the "Stretch Value" field. A "Close" button is visible in the top right corner of the form window.

Close

Add Activity - Develop people management skills

* = Required

Activity Type : External Activities (Activities Not in the Catalog such as Academic Courses, Conferences, and Seminars)

* **Activity Name :** Leadership Development Assignment

* **Target Date :** 9/30/2013 (MM/DD/YYYY)

Priority : 3 - LOW (Improve skill set/may not be current set)

Target Value : 480 (1000)

Stretch Value : 520 (1000)

Add **Cancel**

Enter a **Target Value** for a numerical measure of completion (*optional*).

You can set a **Stretch Value** for a numerical measure above the **Target Value** for exceptional performance.

Click **Add** when finished.





Add an External Activity (cont.)

You have now completed the addition of an external activity.

Goal Name ^	Target Date	Priority	Percent Toward Target	Remove
▼ Develop people management skills	9/30/2013			<input type="button" value="View/Add Notes"/> <input type="button" value="Move Goal"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/>

Details

▼ Activities (1)

Name ^	Due Date	Type	Priority	Status	Target / Stretch	Remove
Leadership Development Assignment	9/30/2013	External Activities (Activities Not in the Catalog such as Academic Courses, Conferences, and Seminars)		NotStarted / 0.00%	480 /	<input type="button" value="View/Add Notes"/> <input type="button" value="Edit"/> <input type="button" value="Update Activity Status"/> <input type="button" value="Remove"/>
				Current: 0		

Remember that external activities require submission of an SF-182 External Training Request.



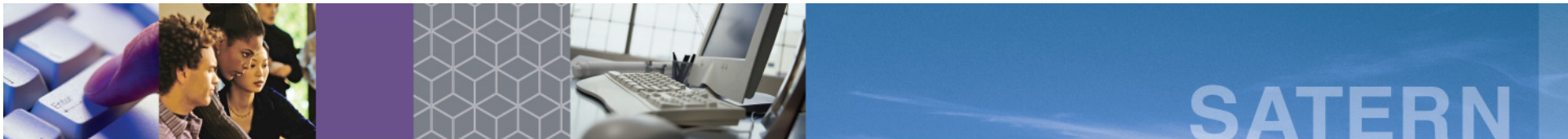


Add an External Activity (cont.)

Let us quickly review:

- You selected **Create New Activity** to create a non-SATERN-based development activity
- You entered the *required* development activity details required by the IDP tool:
 - **Activity Name**
 - **Target Date**
- You assigned the *optional* fields:
 - **Priority**
 - **Target Value**





IDP Flow Chart

